

1. Make conducting business as simple as possible for our customers, stakeholders, and employees

Objectives

1.1. Improve opportunities to file on time, pay on time, and receive prompt refunds

Strategies:

- 1.1.1. Educate public on tax issues and easy ways to file and pay.
 - 1.1.1.1. Promote e-commerce with correspondence to taxpayers who need to file or pay. (RO)
 - 1.1.1.2. Promote our association with the free filing alliance for electronic filing of returns by taxpayers who are eligible for the grocery tax credit.
- 1.1.2. Make necessary changes in credit card payment options to eliminate the absorption of the transaction fee by the State.
 - 1.1.2.1. Publish as much consumer information as possible advertising the change in procedure prior to implementation in January 2009.

1.2. Leverage E commerce and other technologies

Strategies:

- 1.2.1. Expand electronic filing of returns options.
 - 1.2.1.1. Implement partnership returns by September 30, 2008. (RO)
 - 1.2.1.2. Create unclaimed property e-claims using the state web page portal provider by July 2009
 - 1.2.1.3. Implement modernized electronic filing with the IRS for individuals by August 2009.
 - 1.2.1.4. Implement electronic filing of 1099's by January 2009.
- 1.2.2. Expand electronic payment options.
 - 1.2.2.1. Expand direct debit options for income tax payments by January 2010. (RO, MS)
 - 1.2.2.2. Implement an internet based process to allow taxpayers to sign up for and update their own ACH accounts by July 2010. (MS)
- 1.2.3. Use image and bar code technology to process paper 1099's and UCP claims by January 2010.
- 1.2.4. Create the ability to electronically serve a levy to a financial institution.
- 1.2.5. Develop and implement a plan for taking advantage of e-procurement opportunities available to the agency.
 - 1.2.5.1. IT will maintain participation in ITRMC initiatives to improve the e-procurement process for state agencies and local governments. (IT)
- 1.2.6. Configure and install GenTax.NET to provide "self-service" reports and information for agency staff and stakeholders, and allow secure taxpayer access to their own data on agency systems.

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1.2.6.1. IT will take the lead on implementing Taxpayer Access Point in GenTax by the end of fiscal year 2011. (IT)

1.2.7 Implement Check 21 by January 2010. (RO & MS)

1.2.8 Implement virtual batching for permit based taxes by January 2010. (RO)

1.3. Simplify the production and offering of forms, publications, and procedures

Strategies:

1.3.1. Create easy-to-understand publications using clear, concise English and professional design elements.

1.3.1.1. Develop an automated process by December 2008 to review documents at least every two years for ease of reading, design, consistency of message, and determine if documents should be made electronic. (C&O)

1.3.1.2. Create improved information for employers who are required to withhold income tax. (RO)

1.3.2. Create an automated document approval process.

1.3.3. Expand fill-in electronic forms distribution for property tax.

1.3.4. Expand the forms design process to improve data capture from images.

1.4. Continue to develop and expand customer feedback

Strategies:

1.4.1. Research methods of obtaining customer feedback.

1.4.2. Improve communication of operational issues between Field Offices and Boise Office.

1.5. Seek and implement efficiencies, improvements and innovations in agency programs and services

Strategies:

1.5.1. Integrate needed programs and functions into GenTax.

1.5.1.1. Add Kilowatt (KWH) tax by July 2009. (RO)

1.5.1.2. Add Railroad (RR) car company financial reports by July 2009. (RO, CS)

1.5.1.3. Add a Tax Policy and Legal module by July 2010. (TP)

1.5.1.4. Provide e-file of 1099s by January 2009 (RO)

1.5.1.5. Implement temporary permit process January 2009. (RO, AC, IT)

1.5.1.6. Redesign external Web site to improve customer service by December 2008. (C&O)

1.5.2. Increase audit efficiency.

1.5.2.1. Begin implementation of the Tax Discovery Module by July 1, 2008.

1.5.3. Improve management of A/R balance.

1.5.4. Initiate a program to monitor, track, and update the "Form R" process for identifying Operating Property subject to Central Assessment. Target completion date end of 2011. (CS)

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- 1.5.4.1. Audit existing ownership records to locate historic foundation for the identification of Operating Property subject to Central Assessment. (CS)
- 1.5.4.2. Develop an internal repository for existing and new records of ownership on a common drive, available to taxpayers and county GIS departments for inquiry and data exchange.
- 1.5.4.3. Verify boundary and legal descriptions of appurtenant non-operating property and communicate taxable status to taxpayers and counties.
- 1.5.5. Revise the IFTA renewal process. (RO)
- 1.5.6. Complete the GenTax conversion from Letters to Mail by July 2009. (RO)
- 1.5.7. Improve system response time to users by January 2009. (RO)
- 1.5.8. To reduce per page cost, move large print jobs from the Data Center to the Copy Center by June 2009. (C&O, IT)
- 1.5.9. Rewrite the current online SAS system and add the capability currently only available on the paper Personnel Action Request (PAR) form by December 2009. (C&O, IT, HR)
- 1.5.10. Maintain application software/hardware in the most current versions or conditions available and affordable to meet current operations.
 - 1.5.10.1. Upgrade internal accounting and budgeting software (Navision) to version 5.0 in fiscal year 2009.
 - 1.5.10.2. Implement GenTax version 7 when it is released in 2010.
 - 1.5.10.3. Upgrade remittance processing software and hardware in 2010.

1.6. Keep the IT infrastructure current

Strategies:

- 1.6.1. Create and annually update an agency IT Plan that projects infrastructure needs and upgrades along with anticipated new technologies.
 - 1.6.1.1. IT will draft the agency IT plan by July 15 annually and submit to ITRMC. (IT)
- 1.6.2. Define infrastructure needs at the beginning of the fiscal year and prioritize them for funding based on savings during the fiscal year or for future budget request.
- 1.6.3. Create a wireless work environment
 - 1.6.3.1. Create the infrastructure to support wireless connectivity for the agency when security concerns are mitigated. (IT)

2. Recruit, develop, retain, and value a high quality, workforce

Objectives

2.1. Provide a work environment conducive to employee satisfaction

Strategies:

- 2.1.1. Identify the training requirements for each role in the agency.
- 2.1.2. Develop a communication strategy with staff to ensure employees are informed and have the ability to provide input.

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- 2.1.2.1. By December 2009, develop an education and training plan to educate agency employees on IT services and capabilities, and train them on their use. (IT)
- 2.1.2.2. Create an internal program to educate commission employees on the use of electronic filings programs by January 2009.
- 2.1.3. Continue non-monetary award system.
 - 2.1.3.1. Publicly recognize employee achievements on the intranet. (C&O)
- 2.1.4. Develop a culture that encourages innovation.
 - 2.1.4.1. Continue using the intranet and other methods to promote innovative ideas. (C&O)
- 2.1.5. Create a work-from-home workforce of 10% of RO permanent staff by September 2008.
- 2.1.6. Create a wellness program for employees to keep them well and improve attendance. (HR)

2.2. Implement the workforce plan

Strategies:

- 2.2.1. Implement career strategies for employees.
 - 2.2.1.1. Recruitment to find and hire qualified candidates from schools, agencies, or the private sector. (HR)
 - 2.2.1.2. Retention to encourage employees to stay in the agency. (HR)
 - 2.2.1.3. Succession to ensure there are highly qualified people capable of filling critical positions.
 - 2.2.1.4. Knowledge management/transfer to capture the knowledge of experienced employees.
 - 2.2.1.5. Development to prepare employees for specific positions, titles, or occupations.
 - 2.2.1.6. Technology to ensure the agency stays current with technology impacting how the workforce is managed effectively.
 - 2.2.1.7. Position classification to ensure current and future functional requirements of positions are met.

3. Build and strengthen relationships with our customers and stakeholders

Objectives

3.1. Continue and expand outreach and education efforts

Strategies:

- 3.1.1. Create a public relations plan and budget for communicating changes and educating taxpayers.
 - 3.1.1.1. Research current public relations efforts throughout the agency by January 2009. (C&O)
 - 3.1.1.2. Finalize public relations plan and budget by October 2009. (C&O)

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- 3.1.1.3. Create interactive online classes to explain sales and use tax issues for contractors by July 2009. (C&O)
- 3.1.2. Continue participation in governmental association meetings.
- 3.1.3. Promote and encourage active involvement with stakeholders.
 - 3.1.3.1. Every effort should be made to attend conferences held by the Stakeholders, not only to provide input but to become more educated about the issues concerning the Stakeholders annually.

3.2. Maintain, expand, and improve vendor partnerships

Strategies:

- 3.2.1. Encourage a Memorandum of Understanding (MOU) whenever possible between vendors and the ISTC in order to clarify working relationships.
 - 3.2.1.1. Develop and maintain a standard MOU that can be utilized for vendors with similar products and services consistent with the ongoing process within the Technical Support Bureau. (CS)

4. Promote fairness, consistency, and uniformity in the development and administration of tax law and policy

Objectives

4.1. Improve the rules process

Strategies:

- 4.1.1. Include stakeholders in periodic committee meetings to elicit input and feedback.
 - 4.1.1.1. Convene meetings, at least annually, to encourage input from Stakeholders.
- 4.1.2. Give presentations on rules to both employees and external stakeholders.
 - 4.1.2.1. Update, at least annually, all interested parties on Rule changes.

4.2. Participate in uniformity efforts at the state and national levels

Strategies:

- 4.2.1. Assist and participate in state and national forums, and national professional associations.
 - 4.2.1.1. Stay abreast of important technology issues by maintaining participation in state and national technology organizations such as ITRMC, MTC/FTA, TIGERS and others. (IT)

4.3. Develop processes to ensure quality

Strategies:

- 4.3.1. Implement a quality management system based on industry standards and best practices.
 - 4.3.1.1.
- 4.3.2. Implement a process to insure quality and consistency and train employees on it.

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- 4.3.2.1. Develop agency operational policies that cover administrative direction not found in statutes and rules. (RO, AC)
- 4.3.3. Maintain a quality system to ensure consistency of work products prior to distribution to stakeholders.

5. Exercise security and maintain confidentiality of information

Objectives

5.1. Provide a secure Agency for employees and taxpayers

Strategies:

- 5.1.1. Prevent, detect, and respond to attempted breaches to agency security.
 - 5.1.1.1. The Security Operations Committee will work agency wide in a joint effort to strengthen controls and procedures to implement better internal controls. This will be an on going process. (SOC)
- 5.1.2. Improve security awareness in the organization.
 - 5.1.2.1. The Security Operations Committee will continue to develop and present security awareness training to all agency employees. (SOC)
 - 5.1.2.2. The Security Operations Committee will develop and present training to supervisors on GenTax permissions and functionality as well as the use of control and unusual transaction reports. (SOC)
- 5.1.3. Develop self-assessment audit programs.
 - 5.1.3.1. The Security Operations Committee will develop a self-assessment audit program for various areas and responsibilities beginning with physical security area. (SOC)
- 5.1.4. Solicit employee input on security issues/concerns.
 - 5.1.4.1. As part of the annual security training program, encourage employees to bring up to the Security Operations Committee their security issues and concerns. (SOC)
 - 5.1.4.2. The Security Operations Committee will solicit input from Division Administrators and Commissioners as to their concerns on internal controls on an on-going basis. (SOC)

5.2. Develop, implement, and maintain a business continuity plan

Strategies:

- 5.2.1. Assure that all critical business areas and processes develop a business continuity plan by July 2009.
- 5.2.2. Develop, maintain and test a Disaster Recovery Plan.
 - 5.2.2.1. By July 2009, develop, maintain and plan to test an IT disaster Recovery Plan based on the agency's Business Continuity Plan. (IT)

5.3. Emphasize appropriate privacy while recognizing public information requirements

Strategies:

- 5.3.1. Develop an agency-wide privacy assessment and awareness program.
 - 5.3.1.1. By the end of fiscal year 2009, IT will take the lead on an agency-wide privacy assessment and awareness program. (IT)

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5.3.2. Develop and implement an agency Privacy Policy.

5.3.2.1. By the end of calendar year 2009, IT will take the lead on development of an agency Privacy Policy and plan for its implementation. (IT)

5.4. Improve documentation and procedures

Strategies:

5.4.1. Review processes to identify those where current documentation practices and processes are insufficient.

5.4.1.1. By the end of calendar year 2008, review processes to identify those where current documentation practices are insufficient. (EOC)

5.5. Develop, implement, and maintain an information life-cycle management plan.

Strategies:

5.5.1. By the end of FY2011, IT will take the lead on development of an agency Information Life-Cycle Management plan.

5.5.1.1. Research industry best practices and by the end of FY2011, deliver a plan to the IT Steering Committee for implementing information life cycle management.